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Also contained within the report is an analysis of nine individual country markets, namely France, the United Kingdom, West Germany, Italy, Austria, Belgium, the Netherlands, Spain and Sweden.

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Research Summary

This research summary provides a précis of the contents of INPUT's report, *Independent Maintenance—Western Europe, 1989 - 1994.*

A Introduction

INPUT's report, *Independent Maintenance Western Europe, 1989-1994*, produced as part of INPUT's Customer Service Programme—Europe, examines the Western European market for independent maintenance services. The report provides a comprehensive study and analysis of the market and discussion of the various factors that influence market development. The report contains:

- A market forecast for Western Europe overall—segmented by vendor type, TPM, Dealers and Distributors, and Equipment Vendors
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- Listings of leading independent maintenance vendors in Western Europe and in each individual country market
- Profiles of 84 independent maintenance vendors throughout Western Europe
- Listings of major merger and acquisition activities that have taken place in the 1988/89 time frame amongst independent maintenance vendors
- An analysis of vendor opinions on the factors that are influencing growth and contributing to the competitive environment
- Discussion of factors that are inhibiting the market and the likely impact of merger and acquisition activity

Many reasons are given for the acceptance and continuing development of the phenomenon of independent maintenance. The principal factors cited by users are listed in exhibit A.

EXHIBIT A

The Case for Independent Maintenance

- Choice
- Single source
- Multivendor
- Cost
- Local service
- Flexibility
- Quality

B

Market Opportunities

INPUT's forecast for the independent maintenance market is illustrated in Exhibit B. INPUT sizes the market at around $1.5 billion in 1989, forecasting that it will grow at a compound annual growth rate of over 15% over the next five years.

The report discusses the growth of the independent maintenance market for equipment suppliers, where the manufacturer provides multivendor service on sites that include their own equipment.

INPUT analysed nine individual country markets, namely France, the United Kingdom, West Germany, Italy, Austria, Belgium, the Netherlands, Spain and Sweden. Of these country markets, the United Kingdom is by far the largest, with France being the second largest market. The fastest growing market is that of Spain which is likely to achieve a growth rate nearly twice that of the European average.

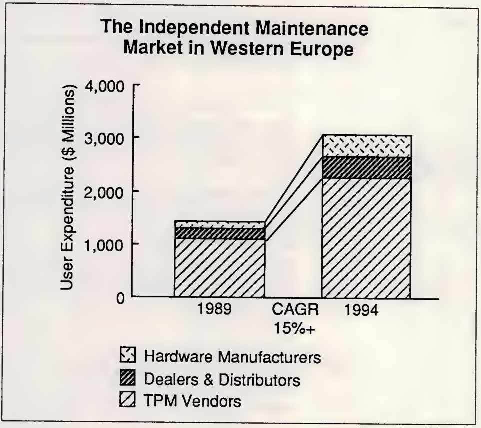
The report examines each country market in some detail, discussing:

- Competitive environment
- Market characteristics
- Growth factors
- Market inhibitors

The country markets are each analysed for three separate categories of vendors:

- Independent vendors (third-party maintainers)
- Dealers and distributors
- Equipment vendors

EXHIBIT B



C

Market Dynamics

The development of the independent maintenance market is subject to a variety of factors. The most significant of these are listed in Exhibit C: the movement towards the provision of other services, pressure to provide a pan-European presence and perhaps partly as a result of that, the trend towards increasing the size of the operation through merger and acquisition activity.

In order to expand their businesses and respond to the users' requirements for additional services, many independent maintenance companies are seeking to extend their range of services by offering, for example, consultancy and disaster recovery services. Other additional activities include equipment and software sales, media and supplies sales and training. Reducing margins on traditional equipment maintenance markets is also a major factor driving this trend.

EXHIBIT C

Market Dynamics

- Move to provide non-maintenance services
- Pan-European trend
- Merger and acquisition activity

The trend towards Pan-European growth continues in the independent maintenance market as companies strive to achieve a competitive international presence. Examples of vendors actively extending their European coverage are Granada, Sorbus, Thomainfor and Econocom. This trend will continue within the momentum of change brought about by the Single European Market initiative and as independent maintainers strive to meet the service needs of multinational companies.

Growth ambitions and the need to develop pan-European coverage are major factors in the trend towards increasing merger and acquisition activity. Clearly, the purchase of other companies in different countries or market sectors gives the acquirer the opportunity to penetrate new country markets and acquire different skills to meet different sector needs.

However, the action of large pan-European companies may potentially blur one of the distinct advantages of the independent maintainer, the responsiveness and flexibility of the small organisation.

D
Vendor Analysis

INPUT's survey of the independent maintenance market in Western Europe includes the identification of leading vendors for each country as well as for the total market. Exhibit D identifies the five leading independent maintainers. However, the ranking of leading vendors is continually changing through merger and acquisition activity.

Additionally, the report profiles eighty-four Western European independent maintenance vendors. These profiles provide:

- Company address and telephone number
- Vendor revenues for 1988
- Revenue forecasts for 1989

EXHIBIT D

Leading TPM Vendors in Western Europe

- Granada
- Sorbus
- Control Data
- Geveke
- IBIMAINT

- Number of staff employed at various levels within the service organization
- Number of service centres
- Type of equipment serviced

INPUT concludes that the independent maintenance market will continue to offer opportunities in all three segments of the market for the foreseeable future. Specific opportunities extend not only to the range of equipment serviced and to investment in the growth of traditional hardware maintenance activities, but to the provision of services other than traditional hardware maintenance.

The result of these changes is that in some cases, new names are appearing among the list of European independent maintenance companies. More significantly, these new names are of companies not previously known as participants in the European independent maintenance market.

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- Local service
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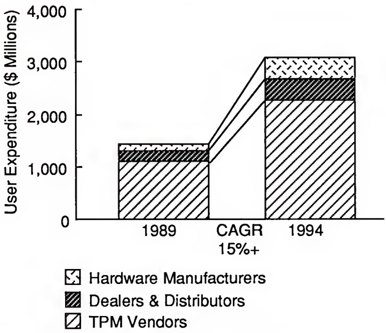
EXHIBIT B

The Independent Maintenance Market in Western Europe



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Market Dynamics

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EXHIBIT C

Market Dynamics

- Move to provide non-maintenance services
- Pan-European trend
- Merger and acquisition activity

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EXHIBIT D

Leading TPM Vendors in Western Europe

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INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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